

## Ben Williams

Former Chief Information Officer, California Department of Water Resources

Ben Williams has over 33 years of senior executive and program management experience in California state government, with over 20 years as an IT leader, serving on the California Information Technology Council, Technology Services Board Services Working Group, and Department of Finance Enterprise Process Advisory Council. He chaired the state IT Strategic Plan Committee.

He was Chief Information Officer of the California Department of Water Resources (DWR) for over six years. During this period, he successfully led a project team to re-implement and expand the functionality of DWR's SAP enterprise resource planning system. Prior to that, he was Executive Director of the Commission for Local Governance for the 21st Century. For 18 years, he was Deputy Director of the Governor's Office of Planning and Research (3 months as Interim Director), serving the administrations of four Governors.

Currently, he is working as an independent consultant to the California State Board of Equalization and the Sierra Nevada Conservancy. He recently completed a management study for the Department of Technology Services, drafted the final state Telecommunications Strategic Plan, and advised a system integrator on a major state IT project.

Ben is a business administration graduate of San Diego State University, and has a Master's Degree in Public Administration from CSU Hayward Government. He is a Project Management Professional (Project Management Institute).

## The Future of WA State Financials – Exploring the Possibilities

### AGENDA

#### Welcome

Victor A. Moore, Director  
Office of Financial Management

#### Where We Are Today

Wolfgang Opitz, Deputy Director  
Office of Financial Management

### The Value and Potential of an Enterprise Resource Planning (ERP) System

Pat Phelan, Research Director  
Gartner Group

### Break

### ERP - The Good, Bad, and Otherwise

#### Panelists:

Mark Meyer — Assistant Director, IT Department, City of Tacoma  
Pat Phelan — Gartner Group  
Ken Rust — CAO, City of Portland  
Ben Williams — former CIO, California Department of Water Resources

#### Moderator:

Wolfgang Opitz

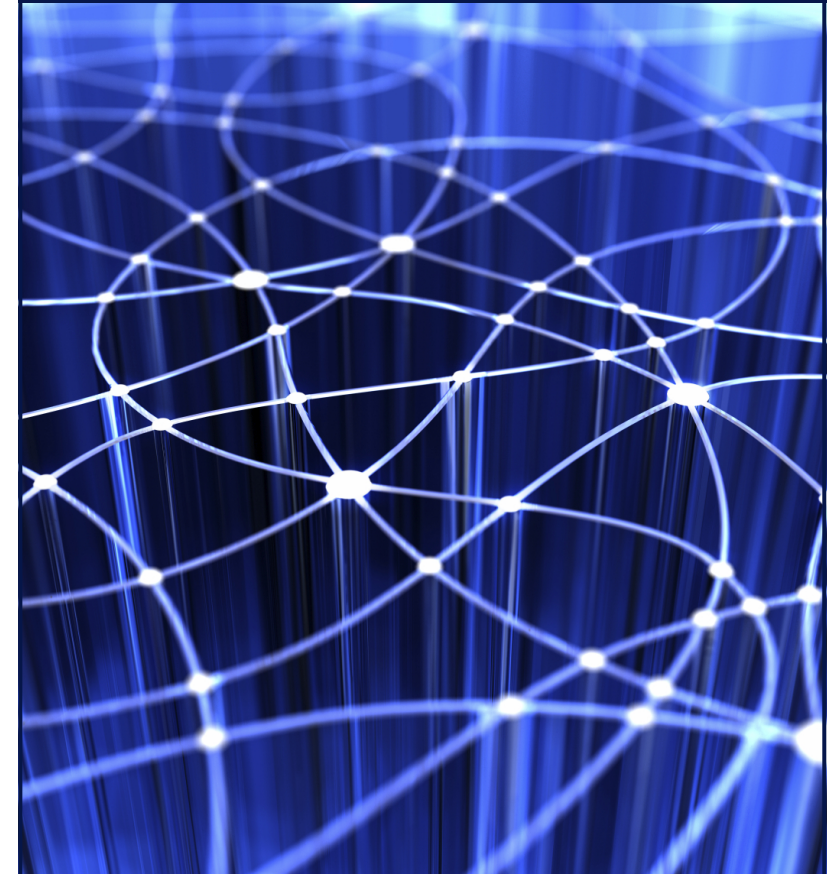
**This session qualifies for 3 Certified Professional Education (CPE) credits.**

**21<sup>ST</sup> Century  
Accountability**

**Roadmap**  
STATE OF WASHINGTON

# The Future of WA State - Exploring the

Department of Labor and Industries Auditorium



**Thursday, March 20, 2008**



## Mark W. Meyer

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Assistant Director, Information Technology Department, City of Tacoma

Mark joined the City of Tacoma in January 2007 as head of the Enterprise Applications Support Division. This division provides software development, project management, business process analysis, training, quality assurance, change management, and requirements development in support of City General Government and the Tacoma Public Utilities.

Mark’s accomplishments since joining the city include formation of a Change Management Section, addition of Project Management to the division’s core competencies, execution of a Limited Enterprise Agreement with SAP, and implementation of a Customer Service program within the division designed to instill a collaborative, customer-centric approach to doing business.

Mark’s IT career spans more than 30 years and is very diverse. He previously worked for Weyerhaeuser, Rainier Bank, Boeing, DMX Music, and the State of Washington. He also worked consulting for a firm headquartered in Kirkland, Washington.

Mark is a cum laude graduate from Pacific Lutheran University where he earned a Bachelor’s degree in Business Administration.

## Victor A. Moore

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Director, Office of Financial Management, State of Washington

Victor Moore was appointed Director of the Office of Financial Management (OFM) in January 2005. He arrived well prepared to become Governor Christine Gregoire’s top budget planner and strategist, and to lead a staff of 275 employees ranging from budget analysts and accountants to economic forecasters and liability-risk managers. Prior to his appointment, Victor served since 1991 as staff head of the Washington House Appropriations Committee with an interlude from 2000 to 2002 to direct Administration and Government Relations for the Administrative Office of the Courts. Victor began his state government career in 1980, working in the budgeting arena at the Evergreen State College, followed by stints at the Senate Ways and Means Committee, the Commission for Vocational Education, (now the Workforce Training and Education Coordinating Board), and at OFM where he oversaw capital construction and transportation budgeting under former Governor Booth Gardner.

A Sacramento native, Victor is a graduate of California State University, Sacramento with a Bachelor of Science in Business Administration.



## Wolfgang Opitz

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Deputy Director, Office of Financial Management, State of Washington

Wolfgang Opitz has served as Deputy Director of the Office of Financial Management (OFM) since July 2000. Prior to that he was a Senior Budget Assistant to the Governor for Education where he prepared and implemented budgets for Washington’s K-12, higher education, and workforce training systems.

Wolfgang was Budget Director for the Washington State Department of Social and Health Services from 1994-1998 where he had responsibility for developing and implementing a \$10 billion biennial budget.

Wolfgang began state service at OFM in 1988 where he performed population forecasting, analysis of health care systems, and assessments of the economic impact of major industries on the state’s communities. He began his career as a research scientist with the Battelle Memorial Institute in Seattle from 1986 to 1988.

A Washington native, Wolfgang received a Bachelor’s degree from the University of Washington in 1982 and his PhD from the University of Texas at Austin in 1986.

## Pat Phelan

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Research Director, Gartner Group

Pat Phelan is a Gartner Group research director specializing in providing assistance to both IT and business management on the ERP application life cycle and project management. Her 26 years of business experience span a number of industries and include IT strategic planning, project/program management, project risk management, consulting practice management, ERP selection and implementation, process improvement and custom development. Although Ms. Phelan’s most recent focus is in the areas of ERP, SCM and CRM implementation and ongoing support strategies, she also has experience in the areas of HR and financial systems. She has been through numerous ERP initiatives including SAP, Oracle, PeopleSoft, J.D. Edwards, Lawson and Great Plains. She joined Gartner in 1999 as an analyst with Gartner Research, and then spent three years in Gartner’s Federal Consulting practice before returning to Research in 2005.

Prior to joining Gartner, Ms. Phelan was the HR/financial systems consulting practice head at Grant Thornton, where she built and managed an HR and financial systems practice with a staff of 30 consultants and an annual sales budget of \$5.5 million. Service

areas included PeopleSoft and SAP implementations, human resource management system (HRMS) selections, pre/post-implementation reviews, and business process re-engineering. She was accountable for day-to-day practice management, new business development, engagement quality, infrastructure development, project management methods and tools, and employee development. Ms. Phelan also developed a national center of excellence for HR systems services. Her client support activities included program management, strategic planning, packaged software selection/implementation and systems methodologies.

## Kenneth L. Rust

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Chief Administrative Officer, City of Portland, OR

Ken Rust is the Chief Administrative Officer for the City of Portland, Oregon, with city-wide responsibilities including direction of the Office of Management and Finance. Service area responsibilities include financial services, technology and communication services, human resources, procurement, and facilities management. As CAO, Mr. Rust provides strategic support on all city-wide initiatives and reports directly to the Mayor and City Council. Prior to this recent assignment, Mr. Rust was Chief Financial Officer and Director of the Bureau of Financial Services for the City of Portland, with responsibilities for budget and financial planning, treasury and debt management, grants management, accounting operations, and pension liabilities. Mr. Rust joined the City in 1993 as Debt Manager with responsibilities for debt transaction management and implementation, rebate reporting and compliance, and preparation of the City’s capital budget.

Before joining the City, Mr. Rust was a Senior Managing Consultant at Public Financial Management, an independent financial advisory firm, providing utility finance consulting services to water and sewer utilities throughout the western United States. He began his professional career as an economist with CH2M HILL, where he specialized in utility ratemaking, capital planning, and project feasibility analysis.

Mr. Rust is a graduate of Portland State University, and holds a Bachelor of Science degree in Economics and Business Administration. He currently serves on the GFOA Executive Board as President-elect of the organization.